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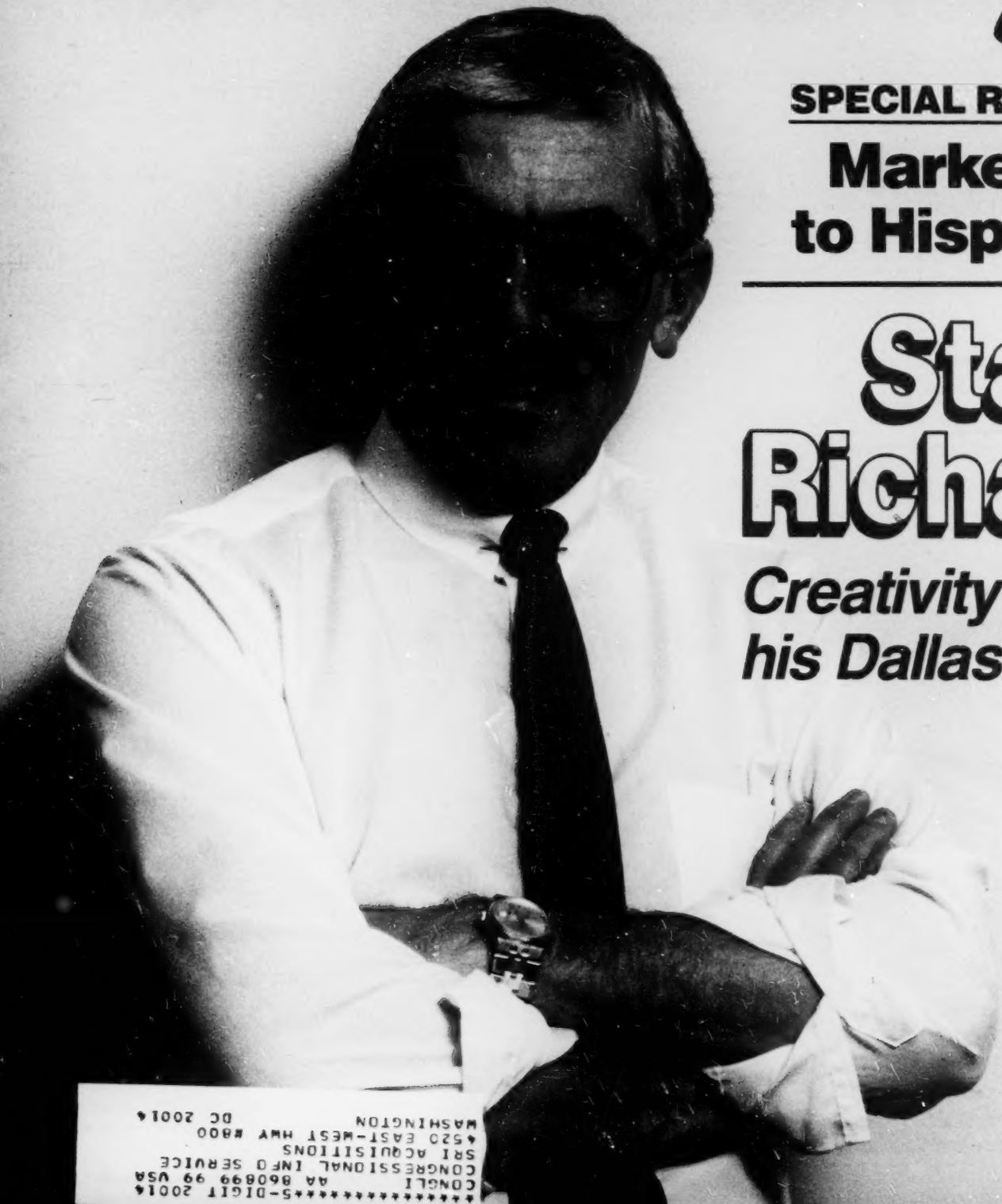
February 27, 1986

Advertising Age Thursday

Crain's Magazine of the Creative Process



SPECIAL REPORT

Marketing to Hispanics

Stan Richards

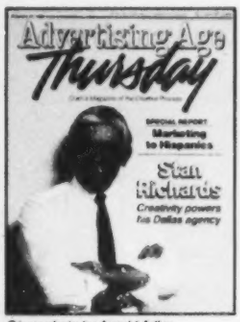
Creativity powers his Dallas agency

CONGLI AA 860899 99 USA
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 2001♦

Thursday

King Richards

Stan Richards wants an airline account. His Dallas-based Richards Group used to have an airline, Muse Air. But in June last year it was absorbed by Southwest Airlines. Just before the buyout, Muse founder and chairman Lamar Muse paid Richards a great compliment: If it hadn't been for the work his agency did, Muse said, Southwest would have picked up the near-bankrupt Muse for next to nothing. As it was, the agency's campaign, touting money-back guarantees and free flights to smokers who would not smoke on the plane, increased load factors and operational profits enough that Southwest had to shell out $60 million for Muse. *See Page 4.*



Cover photo by Arnold Adler

Patch pair

Maybe you don't own a Cabbage Patch calendar. If not, you're missing a real tour de force. From January's sled ride to October's pumpkin carving, each scene transforms the pudgy stuffed dolls into modern icons. How that's done is a secret shared by husband and wife, Bruce Morozko and Deborah Lombardi. He designs sets; she, costumes for Cabbage Patch Kid calendars, notebooks and magazines. *See Page 56.*

Special Report—Hispanic Marketing

Business is picking up for the Hispanic market, but advertising agency and media executives say it still lacks the recognition it deserves. Advertisers spent $333.5 million to reach the Hispanic market in 1985, up 17.2% from 1984. From 1980 to 1985, the Hispanic market rose 16%, to 16.9 million people, according to the U.S. Census Bureau. Special Report examines the Hispanic market's successes and struggles, beginning on *Page 11.*

Pressime

DFS, Dorland forge deal

NEW YORK—Dancer Fitzgerald Sample and Saatchi & Saatchi Co.'s Dorland Advertising subsidiary, reported earlier to have begun merger conversations (AA, Sept. 23), have completed a deal creating DFS Dorland Worldwide, with $1.2 billion in billings. DFS' billings in 1985 were $876 million; London-based Dorland's topped $200 million. The deal is not actually a sale at this time—Dorland will lend $75 million (with interest) to DFS' top five executives, who in turn will create a new company, DFS Management, to buy all existing shares from DFS stockholders. Simultaneously, Dorland has been granted an option to buy 100% of DFS. There will be another payment in 1991 to DFS Management. DFS' pretax profits were $17.6 million in the year ended last Aug. 31.

BankAmerica picks A&D

SAN FRANCISCO—BankAmerica Corp. has selected Allen & Dorward to handle its new $4 million-to-$5 million corporate image account. A&D beat out Ketchum Advertising for the account (AA, Oct. 7). It joins Ketchum and Grey Advertising as BankAmerica agencies.

Federal expresses interest

MEMPHIS—Federal Express Corp. will be a sponsor of the 1988 Winter and Summer Olympics via a marketing agreement announced Feb. 26 with the International Olympic Committee, the USOC and local organizers of the Seoul and Calgary games. Ally & Gargano, New York, handles. Separately, Federal Express has selected the Cherenson Group, Livingston, N.J., for a new eastern regional ad effort.

DHL touts overseas service

SAN BRUNO, CAL.—DHL Worldwide Express on March 9 will kick off a $4.5 million tv and print campaign in 13 major markets, pitching its overseas document delivery services. A new tag line—"Why fool around with an air express service that delivers less of the world?"—plays off rival Federal Express Corp.'s "Why fool around with anyone else?" theme. Ted Bates Advertising/New York handles.

Lysol aims at bleach

NEW YORK—Sterling Drug's Lysol disinfectant this week breaks two 30-second tv commercials, positioning itself against liquid bleach as a household disinfectant. Lysol is marketed by Sterling Drug's Lehn & Fink Consumer Products division, Montvale, N.J. The campaign, via SSC&B:Lintas Worldwide, will be tested in Kansas City and other markets.

More ads blast Sandinistas

WASHINGTON—A $2 million spot tv campaign breaks here today lashing Nicaragua's Sandinista government. Other markets will be added later. The conservative National Endowment for the Preservation of Liberty is sponsoring the campaign, via the Robert Goodman Agency, Baltimore. Another group, the National Conservative Political Action Committee, also is running anti-

(Continued on Page 59)

Street Talk

It seems like every other tv commercial uses a down-home, folksy character to push products. Is the Hokey Joe version of Americana the image for the '80s, or will the Bartles & Jaymes clones vanish before the year is out?

Larry Stillman, senior partner-group creative director, Tatham-Laird & Kudner, Chicago: "I think that sort of thing has been around long before Bartles & Jaymes, but it took Bartles & Jaymes to really make it a popular and widely imitated style. That campaign is done so well and everything else that uses old characters is so imitative, I think it will diminish. While I think the 'old coots' kind of Americana is going to drop off, I think Americana in the sense of a celebration of America will continue strong."

L. STILLMAN

E. LITTLEFORD

Edward Littleford, executive creative director, Foote, Cone & Belding, New York: "No. The down-home imagery is as old as the hills and will endure. The Bartles & James Ma and Pa Kettle-type ads are the third wave, and will continue to spawn a host of imitators. These imitators, however, may miss the point—the campaign is not only some people rocking on a porch, there is a sound marketing idea behind it. The imitators will pick up on the cosmetics of it, but it will be devoid of a marketing idea."

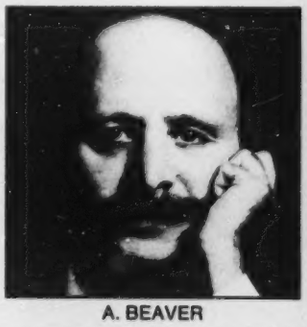
Bob Matsumoto, president, Matsumoto-Herzog, Los Angeles: "It won't last. The Bartles & Jaymes stuff is good, but a lot of the copies aren't executed as well and aren't effective. Most of it won't stand out in the clutter. So the trend will pass. That's the history of advertising, isn't it?"

B. MATSUMOTO

M. GOLDSTEIN

Mark Goldstein, exec vp-corporate creative director, Earle Palmer Brown Cos., Bethesda, Md.: "The advertising business, like music, film and the theater, loves to jump on bandwagons. In the mid-'70s it was disco. In the late '70s it was 'Star Wars.' In the early '80s it was new wave, and in the mid-'80s it's Ronald Reagan and real-people Americans. What's next beats the hell out of me. One trend I like is the tendency to use people who look like they're neighbors and not out of Central Casting. I find that refreshing."

Allan Beaver, executive vp-creative director, Levine Huntley Schmidt & Beaver, New York: "I don't think it's the direction for the '80s, I think it's a technique of the moment. . .a simple technique and a refreshing alternative to the big-budget, slick campaigns currently in vogue. I have always believed the best and most effective campaign is one based on a good idea, executed simply and directly. And basically that's what these executions are—ordinary people talking directly to the viewer."



A. BEAVER

ADVERTISING AGE *Thursday* asks those who serve agency creative and/or media departments to share views on major advertising-related issues. While we're out there making calls for this feature, why wait for the phone to ring? Send pithy comments and a recent photo to: Street Talk, ADVERTISING AGE *Thursday*, 220 E. 42nd St., New York 10017.

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Special Report

Tom Herzberg

Hispanic Marketing

Prime space available at low rates

By Ed Fitch

If the Hispanic market were an outdoor board, it probably would read: "Prime space, cheap rates. Call Hispanic advertising agencies and media for further details."

It promises a good return on investment, yet the Hispanic market is taking a pasting. Hispanic segment ad agency and media professionals, while agreeing business is getting hotter, would be the first to admit if it were *salsa picante* (hot sauce), it would hardly make anyone's tongue curl.

"The business community has not recognized the magnitude of the market," says Enrique Loza, president, Americas Inc., a Chicago-based Hispanic market agency. "The percentage of dollars going into the Hispanic market is still ridiculous."

Also contributing to this story were Candace Campbell and Marcy Gray Rubin, who covered the soft drink industry and Spanish-language tv, respectively, in this Special Report.

The market's amigos
1985 ad budgets
($000,000)

	Hispanic	General
1. Philip Morris	$7.0	$570.4
2. Procter & Gamble	6.5	872.0
Anheuser-Busch	6.5	364.4
4. McDonald's Corp.	6.3	480.0
5. Ford Motor Co.	4.2	559.4
6. Johnson & Johnson	3.5	300.0
7. AT&T	3.2	563.2
8. Colgate-Palmolive	3.0	258.7
Sears, Roebuck & Co.	3.0	746.9
10. R.J. Reynolds Ind.	2.5	678.2
Adolph Coors Co.	2.5	138.7

Source: *Hispanic Business*, Advertising Age

Although expenditures to the U.S. Hispanic market have increased, those involved in the market say expenditures still fall far short of the segment's contribution to many company's profits. In fact, as the Hispanic market has gained demographic clout and media attention, advertisers' commitments to the market have slowed.

Total ad dollars devoted to the Hispanic market stood at $333.5 million in 1985, according to *Hispanic Business*, Santa Barbara, Cal. While this represented a 17.2% increase over 1984 expenditures, the 1983 to 1984 increase stood at 26.8%, and 1983 budgets rose 35.2% over 1982. The rate of companies' dollar investments in the market is lagging.

"I cannot recall any major breakthroughs in new categories of advertisers," says Jorge Caballero, president of Jorge Caballero & Associates, a Chicago-based agency. "Not one new major com-

(Continued on Page 12)

Space available at low rates

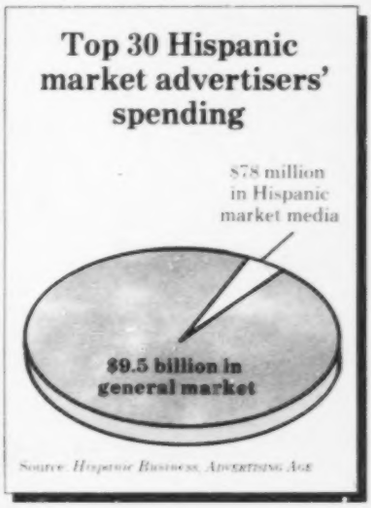
(Continued from Page 11)

pany has come in."

The same names seem to appear year after year on *Hispanic Business*' listing of top Hispanic market advertisers. "For the most part, it's package goods companies and more package goods companies," says Jesus Chavarria, editor-publisher, *Hispanic Business*.

"You may see some new action in a few categories. But a lot of areas—particularly service providers—have yet to do much," he says.

In 1983, 1984 and 1985, the top 25 Hispanic market advertisers' Hispanic budgets were less than 1% of their general market ad expenditures. The best Hispanic-market-to-total-ad-budget ratio occurred in 1984 when the top 25 advertisers' committed 0.99% of their budgets to the Hispanic market. That figure fell to 0.84% in 1985.


Top 30 Hispanic market advertisers' spending
$78 million in Hispanic market media
$9.5 billion in general market
Source: Hispanic Business, Advertising Age

Put simply, the top 25 Hispanic market advertisers are allocating less than 1% of the amount they spend on the general population to reach 7.2% of America's residents, according to a U.S Bureau of Census December report. To paint the over-all picture, consider that these companies are the segment's 25 biggest supporters.

According to *Hispanic Business*, in 1985 the top 30 Hispanic market advertisers spent $78 million. This is $1.2 million less than Hershey Foods' total ad budget. Hershey was the 88th largest national advertiser, according to Advertising Age.

"The amount of money corporate America spends to address the Hispanic market is a pittance when compared to total advertising expenditures," says Tony Bonilla, chairman, National Hispanic Leadership Conference, a Washington-based think tank.

Many of the companies that direct some dollars to the Hispanic market have curtailed those investments, Mr. Caballero says.

"And companies that are spending a substantial amount of money are not spending in relation to the size of the Hispanic market."

According to the Census Bureau, from 1980 to 1985 the over-all population increased 3.3%. During the same time the Hispanic market rose 16%, to 16.9 million people.

Not only did the raw numbers rise, but the quality of the segment also improved, says Lennart Ringquist, president of New York-based BlairSpan, a John Blair & Co. subsidiary that produces and syndicates Spanish-language programing. "The market is constantly being fed by immigrants," he says, "and the quality of that immigrant is accelerating."

Previous waves of immigrants may have been primarily unskilled laborers, Mr. Ringquist says, while new arrivals today possess more marketable and professional skills—and therefore greater disposable income.

Hispanics' 1984 median family income hit $18,833, according to the Census Bureau's recent report. Although this fell well below the total population's figure of $26,433, it represents a significant improvement over the segment's 1982 median family income of $16,228.

The market's improving demographics and spending patterns demand more response from advertisers, Hispanic ad executives say.

"There seems to be the attitude, 'Give them $100,000 to keep them happy,'" says one executive. "How do you expect to reach 20 million people today with such a small budget? There are a lot more social issues here than meet the eye—a lot of tokenism."

Some people simply will not approach the market. "A great deal of attitude goes to 'Why should we cater to Latinos?' and 'Why don't they speak English?'" Mr. Loza says.

This posture, he says, has nothing to do with a business analysis.

"I believe there is a bit of prejudice and ignorance of who Hispanics are and what they buy," Mr. Caballero says. He illustrates the point with a story about a marketing executive at a shampoo manufacturer who said they didn't target Hispanics because they don't have an ethnic product.

"My thought was, 'What is a Hispanic shampoo?' It's the same one everyone else is using. They also say there aren't numbers, but the numbers have been there for years."

The more information a Hispanic ad agency or media company can present, the faster companies will come around, says Castor Fernandez, president, Castor Spanish International, a New York-based Hispanic marketing agency. "I've been doing this for 18 years and God knows I want to spark businesses into doing more, but advertising agencies aren't the answers."

Many times agencies are the catalyst, he says, "but what's needed is more market information."

If Hispanic ad agencies pursue business, their actions are viewed as self-serving, says Hector Elizalde, director-Hispanic marketing, Purchase, N.Y.-based PepsiCo. The lack of documentation also is a problem.

"You know what MBA types are like," he says. "They aren't going to move unless it's well documented."

Another reason the Hispanic market hasn't been sought effectively is companies must commit to approaching it from the top down, Mr. Elizalde says, a commitment some companies do not make.

"That's what makes the difference between companies—how much they do and how well they do it," he says.

Strangely, some companies pour millions of dollars into multinational operations in Latin America, yet do not invest in the U.S. Hispanic market, says Jacqueline Da Costa, senior vp-media director, Ted Bates Advertising/New York. The immigrant factor makes this situation more astounding, Mr. Loza says.

"No matter where we come from, we all grow up with Kraft and Quaker; we know Goodyear, Ford, Chevrolet," he says. "We grow up dreaming of owning American cars, American televisions. We struggle through forests and jungles to get to America to buy those things. It is a lot nicer and easier if someone puts them right in our path through a radio or tv spot."

Ms. Da Costa says the multinational companies are missing a sure bet. "They let strong franchises slip through their fingers because they are unwilling to make the same commitments they have overseas."

Although the home-grown Hispanic market is large, corporate America may not consider it sizable enough to justify the manpower and investments needed to target it professionally. "It's like reaching out to any segment," Mr. Caballero says. Companies must commit to performing research and developing a total marketing program to sell their products, he says.

A spokesman for White Plains, N.Y.-based General Foods affirms Mr. Caballero's suppositions.

Any marketing segmentation diverts funds and involves twice as much research and effort to launch as a national campaign, he says, adding that national campaigns typically yield 10 times to 20 times more revenue for the same amount of effort.

Yet General Foods is a big Hispanic market supporter. In 1985 it spent $2 million advertising to Hispanics, enough to make it the No. 13 advertiser on the *Hispanic Business* list.

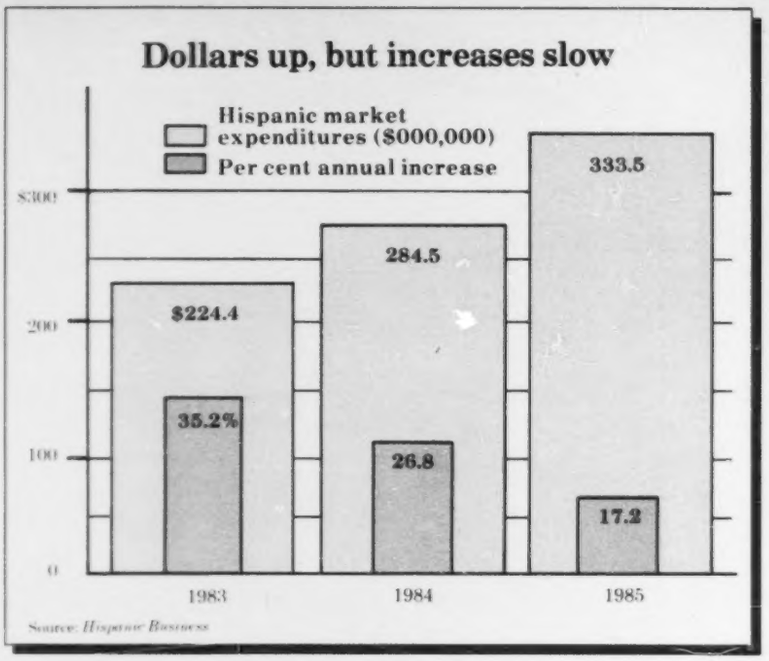
The company's active role, the spokeman says, is "a matter of upfront faith." It also does not hurt that General Foods has the internal research capabilities "to identify and invest in product opportunities here and in Latin America. If our estimates turn out to be right, we don't need as many hard numbers."

The company initially overspends to attract consumers and then tightens up, he says, rather than underspend and not reach the target.

General Foods' approach may become the preferred method of investigating the Hispanic market: Dangle some toes, test the water and then jump in—or at least wade in to shin depth. Even halfhearted attempts would be welcomed by those who are certain the results would encourage more activity.

"My only hope is companies will see the fruits of the little they are doing and be encouraged to continue and expand those efforts," Mr. Loza says. "The business community needs to review its marketing efforts, and when it does it will find this is a good segment to increase the bottom line."

Hispanic media and advertising professionals would like to see that outdoor board read: "Prime space, reasonable—not cheap—rates."



The Hispanic market at a glance
The market consists of 16.9 million people.
10.3 million are of Mexican descent.
1 million are of Cuban descent, and 2.6 million are Puerto Rican.
1.7 million are Central/South American, and 1.4 million are of other Spanish origin.
7.2%
Hispanics comprise 7.2% of total U.S. population.
From 1980 to 1985, the Hispanic population grew 16%, compared to 3.3% of the general population.
In 1984 Hispanic median household income was $18,833.
Sources: U.S. Dept. of Commerce, Bureau of Census

Network vs. independents spices up programing

By Marcy Gray Rubin

Caramba, there's someone else out there. Imagine living in a town that had only one tv station. One day, you turn on the set and suddenly find two channels.

Your reaction most likely would be similar to those of Hispanics in cities finally served by two fulltime Spanish-language tv stations—they seem to be watching both.

Spanish-language tv broadcasting has been dominated by New York-based SIN Television Network and its host of 364 satellite affiliates. But that stronghold is being challenged by a string of independents struggling to win recognition in their markets.

This changing competitive picture perhaps is best illustrated by activity in New York, Los Angeles and Chicago. In Los Angeles, independent newcomer KVEA-TV is challenging powerhouse SIN affiliate KMEX-TV. After the launch of SIN's newest brainchild, WSNS-TV, independent WBBS-TV bowed out of the Chicago market, leaving only WCIU-TV to battle WSNS for viewers. And in New York, the 19-year battle between SIN's WXTV and independent WNJU-TV continues to heat up.

New York

By SIN executives' own admission, New York remains their toughest market. While independent WNJU typically has maintained a slight edge, that may be changing.

According to Eileen Martinez Holmes, vp-general sales manager, WXTV, New York, studies done by Miami-based Strategy Research Corp. gave WXTV 50% to 55% of all prime-time Hispanic audiences from October to November.

Ms. Holmes credits the boost to Rosita Peru, SIN's vp-programing, who has concentrated on cultivating larger youth audiences through contemporary-style *novelas* and variety programs.

The growing numbers of New York's South and Central Americans also are not being reached by her competitor's programing, she says.

Although Ms. Holmes says that "sometimes being a network affiliate can be restrictive," she stresses the over-all advantage. "Belonging to SIN forces us to maintain their high standards. It gives WXTV our professional polish, our sophisticated on-air look."

Ms. Holmes illustrates this statement with a reference to WXTV's locally produced 6 p.m. newscast, which she says is seen in 383,000 Hispanic households —representing a 100% increase over last year.

Marcy Gray Rubin is a New York-based free-lance writer and former reporter for Back Stage.

> ***"Belonging to SIN forces us to maintain their high standards. It gives WXTV our professional polish, our sophisticated on-air look."***
>
> **Eileen Martinez Holmes, WXTV**

Generally, WXTV's format typifies SIN's reliance on foreign, particularly Mexican-oriented programing, a policy SIN's opponents criticize. "We buy the best Spanish-language programing available—regardless of origin—that appeals to our affiliate audiences," says William Stiles, SIN's exec vp. This programing includes musicals, morning and late-night talk shows, live sports events, Spanish-language films, children's and comedy shows, and, of course, the *novelas* that are the backbone of Hispanic programing, he says.

Like all SIN affiliates, WXTV carries a number of network-produced programs, the most impressive of which is "Noticiero SIN." This half-hour, Miami-based 6:30 p.m. newscast follows the affiliate news and provides in-depth international coverage. According to John Pero, SIN's exec vp-sales, the newscast costs the network more than $4 million annually to produce.

A new network entry "Mundo Latino," the first U.S.-produced Spanish-language morning talk show, kicked off in late January. The show's style suggests it could have been named "Buenos Dias America" because its format—interviews, current events, news, sports and weather—is similar to "Good Morning America." The show is broadcast live from Los Angeles and Miami with special reports filed from New York and Washing-

(Continued on Page 38)

If you want to reach Hispanic Americans where they live, you have to consider Vista.

Vista is the weekend newspaper magazine that has been taken to heart by more than 1,300,000 readers in 19 cities across the U.S.

The reason behind this emotional attachment—so our readers tell us—is simple.

We hit home.

With news and stories about the Hispanic community, about Latin America. About Hispanic personalities and lifestyles. About piecing together the American dream, one day at a time.

So if you want to reach Hispanic Americans where they live. Catch them at home. On the weekend. In Vista.

Hitting home with Hispanic Americans.

Vista

(212) 972-5910
501 Fifth Avenue
N.Y., N.Y. 10017

Network vs. independent stations

(Continued from Page 37)
ton. WXTV supplements the national program with a weekday talk show called "New York Ahora."

Like many independents, WNJU's programing targets its specific market, carrying a heavier share of "Caribbean" programing aimed at New York's predominantly Puerto Rican and Dominican Republic Hispanic population.

Carlos Barba, the station's president-general manager, says when he first came to WNJU in 1970, the oldest existing Spanish-language station was in severe disarray. "Sales were at $1.2 million, expenses were at $3.5 million and they were giving airtime away to advertisers," he says.

Mr. Barba quickly organized focus groups to learn more about his market and audience composition. Discovering that women made up 72% of his daytime audience, he created a horizontal approach to programing centering on *novelas*, variety shows and more *novelas*. Action shows were added to the mix at night to attract male viewers. To increase his revenues, Mr. Barba also leases WNJU to other minorities during light Hispanic viewing slots.

Like most of his colleagues, he says his station's primary objective is to provide public service. WNJU pulled in more than $1 million for victims of the recent mudslide in Puerto Rico. During the volcanic eruption in Colombia, Mr. Barba took to the streets for a mobile marathon that resulted in 400 tons of emergency supplies.

Public efforts like these help increase the station's presence in the local community, where local programing may fall short. Although executives at both Spanish-language stations say they would like to increase their local programing, New York production costs limit larger efforts, they say. "I employ seven unions that receive payments and benefits equal to any other station in New York," Mr. Barba says.

A mix of 65% national and 35% local coverage would be ideal, he says. For now Mr. Barba must be content with WNJU's 11 p.m. newscast, public service updates and coverage of Hispanic parades and festivals.

Despite SIN's clout and WNJU's jockeying for position, these two stations may be destined to continue running a never-ending race. Jacqueline Da Costa, senior vp, Ted Bates Advertising/New York, says she incorporates both stations in her media mix, depending on the client's specific needs.

If her target audience is demographically broader, Ms. Da Costa says she selects WXTV. If a narrower audience is desired, she opts for WNJU. When the budget is too small to cover both stations, Ms. Da Costa alternates placements between the two stations each quarter.

Los Angeles

If any station were to be called the Goliath of Spanish-language tv, it would be Los Angeles-based KMEX-TV, SIN's oldest affiliate. KMEX claims to reach 87% of Southern California's Hispanics.

Small wonder then that since the station made its debut in 1962, Daniel Villanueva, president-general manager, has seen a long line of contenders disappear, turn their attention to other minority groups or take what is perhaps an easier competitive route and become English-language stations.

Explaining his station's success, Mr. Villanueva says, "We have a relationship with our viewers that isn't found anywhere else. People refer to KMEX as 'Our Channel 34.' We're filling an incredible communications gap."

According to Strategy Research, last October and November, KMEX captured 45% of the Hispanic prime-time audience as compared to 43% during the same time in 1984.

But the specter of KMEX's domination didn't stop KVEA from entering the ring last November as a fulltime, Spanish-language station. With the exception of KSCI-TV, which broadcasts in Spanish 35% of the time, KMEX was the only game in town.

"We felt the community was underrepresented, having just one fulltime station that also was tied to a network," says Joseph Wallach, KVEA's president-chief executive officer. "We believe both economically and in terms of programing that another station could be supported, giving Latino viewers a choice."

Mario Lazo, media director, Mendoza, Dillon & Asociados, Newport Beach, Cal., agrees. "I certainly think Los Angeles can support two fulltime stations if New York can."

Viewers' choices, according to KVEA executives, are between KMEX's imported programing and KVEA's more locally oriented slant. "You don't see a lot of local coverage on any Spanish-language station except during a catastrophe," Mr. Lazo says. Although the bulk of KMEX's schedule consists of SIN programing, the station does produce its own news, public affairs and sports shows, as well as "Mundo Latino," which is syndicated in 30 markets.

Mr. Villanueva stresses community service to his staff, members of which serve on 29 boards. The station conducts voter registration and citizenship drives, holds annual charity telethons and is credited with doing more public service spots than any other Los Angeles station. During the recent disasters in Puerto Rico, Mexico and Colombia, KMEX raised $11.9 million while providing 24-hour coverage.

Unlike many of its predecessors, Estrella Communications, KVEA's investors, has committed itself to Spanish-language broadcasting in a big way. Station executives say total startup expenditures hit $40 million, including a $500,000 promotional kickoff and an undisclosed local production budget.

In addition to the usual mix of imported programing, KVEA is emphasizing local and community service programing. As of now, efforts include daily 11 p.m. newscasts; minidocumentaries focusing on subjects like employe and Social Security benefits, how to get a driver's license or insurance, and a half-hour magazine show, covering

(Continued on Page 41)

Top 3 markets garner media dollars

Hispanic media expenditures

($000,000)

	Total	Tv	Radio	Print
1. Los Angeles	$59.2	$30.0	$22.0	$ 7.2
2. Miami	55.7	24.5	18.0	13.2
3. New York	51.5	21.5	20.0	10.0
4. San Antonio	15.0	7.5	7.5	—
5. San Francisco/San Jose	14.0	8.0	6.0	—
6. Chicago	11.5	5.5	6.0	—
7. San Diego	8.0	5.0	3.0	—
8. El Paso	6.8	1.8	5.0	—
9. Phoenix	5.7	3.5	2.2	—
10. Fresno	4.5	3.0	1.5	—

Source: *Hispanic Business*

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graming and promotions. "A lot of people had been locked out," she says.

"Before only Bud, Miller and Coke were sponsors. Now you're starting to see Coors, Ford, Libby and some cigaret companies come in and use the other outlets."

One caveat before radio gurus cave in to sudden urges to *hablan Espanol*: The market is not going to be served up on a platter with guacamole on the side. "It won't be easy for them," says Jorge Caballero, president, Jorge Caballero & Associates, a Chicago-based ad agency. "Advertisers are not necessarily increasing the money they spend in the market in relation to the increase in media."

Ms. Stoll puts it simply: "Survival depends on how many advertisers come into the market, and more advertisers need to come into the market."

If WOJO's business had been divided among the market's major stations it would not support all three radio stations, WTAQ's Mr. Newman says. "But now three sales forces are out on the streets."

> ***"Advertisers are not necessarily increasing the money they spend in the market . . . ."***
>
> **Jorge Caballero**
> **Caballero & Associates**

Advertisers were bypassing Chicago because WOJO's noncompetitive situation did not force them to present hard-hitting sales presentations about the Chicago market, he says. Now all the stations have to be more hard nosed about their business.

Mr. Brooks says Chicago has enough business to keep even more radio stations in the money.

"We have advertisers coming to us who have never gone into the Hispanic market before. We're making the pie bigger," he says.

Although that pie may be bigger, establishing a solid core of listeners may not be a piece of cake.

"The key element in Spanish language media is loyalty," Ms. Sofios says. "The others will have to create a larger audience."

The stations have embarked on aggressive promotional efforts to accomplish this task, and Mr. Newman says the market will expand.

"There is no animosity here, just clean, pure competition. Our main concern is uplifting the market."

As goes the market, so go revenues.

—Ed Fitch

Network vs. independents

(Continued from Page 38)

health, education and employment opportunities. A woman's show also is being developed.

Estrella also purchased the rights to syndicate Spanish-dubbed series like "Daktari," and "Medical Center," as well as feature films "Doctor Zhivago" and "Coma." Additionally the station has joined New York-based NetSpan's consortium and will carry its "Espectacular" specials.

Although KVEA executives remain confident about the future, they are realistic about their Herculean task. "KMEX is a powerhouse, a household staple," says Paul Niedermeyer, KVEA general manager. "To try and topple their superiority we have to achieve close to 40% share of the ratings."

According to Arbitron, the station's share grew from 32% the first week to 41% in five weeks. A more recent sampling, however, puts the split 85% in favor of KMEX, SIN's Mr. Stiles says. This mirrors the national picture, he says, where in any given market independents draw 20% to 30% of the viewers compared with SIN affiliates' typical 70% to 85%.

Mr. Wallach remains confident. "We are fighting aggressively to find our niche. We have brought our influence into what was a sleepy, one station market," he says. "KMEX is reacting with a healthy competitiveness, which enables more choices for the viewer and the advertiser."

Mr. Villanueva says he is interested in seeing what Mr. Wallach will do in the market. "I welcome KVEA and look forward to having someone else share the load," he says, "because ultimately the biggest beneficiaries will be the Hispanic community."

Los Angeles' Hispanic community currently stands at 4.5 million, he says, and is expected to reach 6.2 million by 1990.

"I'm sure we can absorb KVEA as we would another Spanish-language radio or newspaper." KMEX's track record, seems to justify Mr. Villanueva's apparent lack of concern.

Chicago

While Los Angeles may be able to support two fulltime tv stations, industry observers say the same may not be true for Chicago. Until recently Chicago was the home of two parttime Spanish-language stations, WCIU-TV and WBBS-TV.

On July 1, SIN established its first fulltime Chicago affiliate, WSNS-TV. The station's entrance led WBBS to bow out of the market and has put a strain on WCIU's ratings picture. According to fall, 1985, Strategy Research findings, WSNS already had garnered 28% of the prime-time total audience.

(Continued on Page 42)

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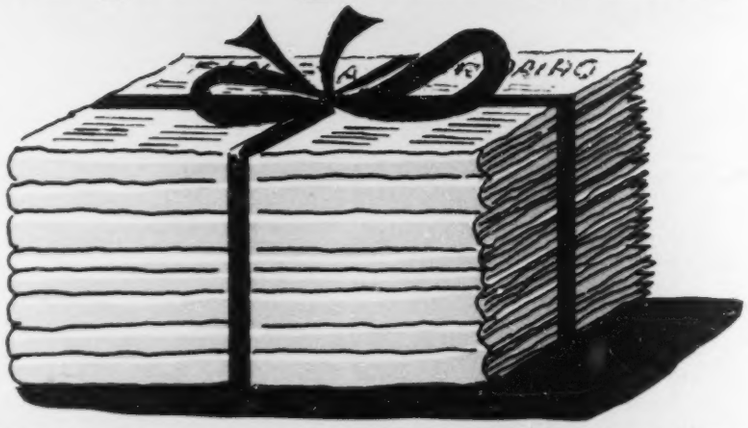

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Network vs. independents

(Continued from Page 41)

While WSNS is banking on SIN's programing and reputation to power it into the lead, Howard Shapiro, WCIU's president-general manager, is counting on audience loyalty and his station's 20-year history.

Like most independent station managers, Mr. Shapiro credits WCIU's longevity to local programing.

Seventy-two per cent of the station's local coverage is live, including 6 p.m. and 10 p.m. newscasts; a children's show; a self-help, call-in show that receives 80 calls a day, and a bilingual game show that receives an average 6,000 to 10,000 cards each week.

Reacting to his newest competitor, Mr. Shapiro says, "I don't think you can make money out of a fulltime Spanish station. If I thought you could I would've done it myself." WCIU brokers airtime to other minority programing as well as the Financial News Network.

According to Wayne Casa, president-general manager of WSNS, WCIU's checkered programing convinced SIN that Chicago was ripe for a fulltime Spanish station. "We always wanted to be in the Chicago market," SIN's John Pero says. "Although WCIU carried our programing, they were never considered part of the SIN network."

SIN has brought more quality programing to Chicago, increasing the number of Hispanics who are selecting Spanish-language tv over English-language fare, says Jorge Caballero, president, Jorge Caballero & Associates, a Chicago-based agency.

He also says advertisers were not paying attention to Chicago as a Hispanic market. "Maybe with SIN in the market they will," he says.

Unlike New York and Los Angeles, which at times compete with the primary Anglo stations, Mr. Casa says Chicago Hispanic tv always will be a secondary buy.

This allows the stations greater opportunity to do aggressive, local programing than in New York or Los Angeles, "where there's less preempting and more reliance on network fare."

Because Chicago is still in its infancy as a media center, he says, it will grow at a greater rate than the other markets.

Seventy-two per cent of Chicago station WCIU's local coverage is live.

Mr. Casa says SIN provides the financial leverage to purchase the best Spanish programing. He stresses the importance of screening shows to ensure his audience has a real alternative to English-language fare.

Although the network-to-local programing ratio stands at 85% to 15%, Mr. Casa says he hopes to achieve a 75% to 25% mix. Local production plans include a monthly health-oriented show, a public affairs program, musical variety show and a 10 p.m. newscast.

WSNS is committed to producing shows that reflect the life styles of American Hispanics, he says. "Whether they immigrated or were born here, the lives of Hispanics have changed and we must keep pace with these changes."

At this point Chicago's ability to support two Spanish-language stations remains in question. Mr. Shapiro says inadequate advertising revenue will result in "two losers and no winners."

Others, like Mr. Caballero, predict competition will focus greater visibility on the local Hispanic market, bringing more dollars to it.

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FCC flags foreign ownership

SIN Television Network, usually highlighted for its stunning ability to command Hispanic media markets, is in the media spotlight for a reason network executives probably wish would remain in the shadows.

A matter of legalities has thrust SIN and seven of its affiliates, including New York's WXTV and Los Angeles' KMEX, into conflict with the Federal Communications Commission. Five of the affiliate stations are controlled by Spanish International Communications Corp. William Stiles, SIN's exec vp, says the seven stations' combined value is $100 million—"and that's a conservative estimate."

Rene Anselmo, SIN's president-chief executive officer, and the Azcarraga family, which controls Televisa, Mexico's major broadcasting company and a 75% shareholder in SIN, are SICC shareholders. The issue revolves around the long-standing relationship of Mr. Anselmo and the Azcarragas.

An FCC judge basically has ruled that Mr. Anselmo represents alien interests, despite his American citizenship, and that the combined Anselmo-Azcarraga shares in SICC violate the 20% alien ownership limit set by federal regulations. Two stations in Phoenix and San Francisco—ones in which Mr. Anselmo is a substantial shareholder but are not controlled by SICC or connected to the Azcarragas—have been made parties to the ruling.

SICC lawyers say the company will continue to operate its five stations and the ruling will be appealed. At press time, SICC was investigating some structural changes. Whether they will be enough for the FCC is undetermined. "But it is a problem SICC has to resolve," Mr. Stiles says. "SIN cannot resolve it."

Although the charges may have major implications for SIN's affiliates and their competitors, the Hispanic media and advertising community has rallied behind the network.

Referring to Televisa as "a monster," Jorge Caballero, president of Jorge Caballero & Associates, a Chicago-based Hispanic ad agency, stands behind SIN, saying it has opened up many employment opportunities and heightened recognition of Spanish-language media.

Jacqueline Da Costa, senior vp-media director, Ted Bates Advertising/New York, agrees wholeheartedly. "SIN has done a great service regardless of what is being charged," she says. "Their sales staff and station managers are real pioneers who have gotten to where they are by being tough. I think SIN's efforts should be supported in reaching a solution that doesn't hamper the network's progress."

"I think SIN's efforts should be supported in reaching a solution that doesn't hamper . . . progress."
Jacqueline Da Costa
Ted Bates Advertising

Even competitors, who would benefit most by SIN being tripped by legal hamstrings, are standing by their rivals. "I don't think SIN was out to do anything intentionally wrong," says Carlos Barba, president, WNJU-TV, New York. "Unfortunately they thought they could run a broadcasting operation in the United States like they do in Mexico, where there is less government regulation."

He says he hopes the problem is resolved in SIN's favor, "because I would hate to wake up and not have any competition to drive me on to do better."

One of the general managers affected by the ruling has found a silver lining in the decision. The front-page coverage and concern generated by the FCC decision is proof of KMEX's crucial importance to the California community, says Daniel Villanueva, KMEX's president-general manager.

—Marcy Gray Rubin

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MediaWorks

ON THE DIAL

Scheduled radio specials and new programs or syndicated services.

NBC Radio Networks' "Profile 86" series, a 90-minute monthly series that focuses on a particular group or artist's life and music, features Canadian rocker Bryan Adams the weekend of March 28 to 30. Closing date for advertising is March 10. Among participating advertisers at press time was Anheuser-Busch.

Westwood One Radio Networks' Mutual Broadcasting System will add a two-hour lead-in to its all-night "Larry King Show" April 14 as Toni Grant, a popular Los Angeles radio psychologist, begins airing nightly. Grant was heard on KABC in Los Angeles from 1975 until December, 1985, with the later years also carried over the ABC

BRYAN ADAMS

Talkradio Network. The Monday through Friday program will originate in Los Angeles and air from 9 p.m. to 11 p.m. eastern time. The "Larry King Show" begins at 11 p.m. and runs through 5 a.m.

Global Satellite Network begins offering a three-hour weekly radio program featuring rock 'n' roll classics April 5. The new show, called "Reelin' In the Years," will be hosted by George Taylor Morris. The program will consist exclusively of '60s-era music.

Transtar Radio Networks adds a fourth, 24-hour live network to its present three nets May 1 with the introduction of "The Oldies Channel," a turnkey service that will concentrate on the mid and late '60s but will also feature some '50s and early '70s music. All the music, says the net, will be "carefully tested" so as not to cause tune-out among the primary target audience, men 25 to 54 and women in the same age range. ■

TV AVAILS

A weekly listing of tv programming that still has commercial availabilities open in the next few weeks.

"Throb," a weekly half-hour sitcom about a divorced mother in her 30s (Diana Canova) working in today's teen-oriented rock-music business, has been cleared in 19 of the top 20 markets, with syndicator Worldvision Enterprises, New York, projecting at least 100 markets by its fall start in barter syndication, in prime time or prime time access slots. Among outlets booked are three NBC-owned outlets (WNBC-TV, New York; KNBC, Los Angeles, and WMAQ, Chicago). Thirty-second ad units are going for $50,000. Co-produced by Procter & Gamble Productions and Taft Entertainment Group, "Throb" will have one national ad minute per week taken by Procter & Gamble,

Diana Canova stars in "Throb," a weekly sitcom about a young divorced mother who works in the rock-music business.

Cincinnati; the two remaining national minutes are being sold by Worldvision.

"The Jetsons," a weekly half-hour animated series from Worldvision Enterprises, New York, has about three units per week through the second quarter for $8,500 each. The show is cleared in 94 markets and gets a 6.5 to 6.8 rating for children ages 2 to 11. "Jetsons," which mostly airs in early fringe, has double runs in about 20% of its markets. Due to lower viewing levels, the show's ratings are expected to decline to 6 by the second quarter.

"The Funtastic World of Hanna-Barbera," also from Worldvision, has a few avails left in the second quarter for $9,500 each. The 1½-hour animated block will be expanded to two hours in mid-September. "Funtastic" is cleared in 75% of the country, or 96 markets, and airs Sunday mornings. The show has been delivering 9 to 10 ratings for children 2 to 11, a figure expected to drop to 7 to 8 by the second quarter. ■

NEWSSTAND

A listing of scheduled print advertising opportunities, such as special issues and special advertising sections.

The Wall Street Journal, New York, "The corporate woman" tabloid special report, March 24 issue; ad close: March 3. B&w page: $57,330.

Texas Monthly, Austin, Tex., "Islands in the sun," special Caribbean advertising section, May issue; ad close: March 5 (space), March 10 (materials). B&w page: $8,050; color page: $12,340.

Consumers Digest, Chicago, 1986 buyers guide issues in May and November; May issue ad close March 10. B&w page: $14,365; color page: $21,545.

Signature, New York, special gift-guide section, May issue; ad close: March 10. ¼-page: $4,000; two ¼-page ads: $6,000.

Venture, New York, office equipment special advertising section, May issue; ad close: March 17. B&w page: $12,995; color page: $19,995.

Automobile International, New York, May special fleets issue; ad close: March 20. B&w page: $2,945 (English edition), $2,185 (Spanish), $4,615 (both); color page: $3,845 (English), $3,045 (Spanish), $5,515 (both).

Forbes, New York, focusing on Israel, special advertising section, May 19 issue; ad close: March 24. B&w page: $27,810; color page: $42,290.

Chicago Tribune, "Technology in the workplace" tabloid, April 6. Ad close March 26; page general b&w rate is $18,713; color page: $21,663.

USA Today, Rosslyn, Va., "The new office" special bonus section, April 14 issue; ad close: March 28. B&w page: $33,314; color page: $41,642.

American Health and **Working Woman**, New York, "Fit & fabulous: The beauty rights of summer," special advertising supplement, June issues; ad close: April 1. B&w page: $26,250; color page: $36,100.

Computer Retail News, Manhasset, N.Y., *Micro-Product Review* supplement on modems and communications, April 28 issue; ad close: April 7. B&w page: $4,305; color page: $5,205.

Chicago Tribune, special tabloid dining guide sections, May 18, Oct. 5 and Dec. 7. Ad closings May 7, Sept. 24 and Dec. 3, respectively. Zoned six ways, a full-run b&w restaurant page is $4,883.

Scientific American, seventh annual "Japanese technology today" special advertising section, November issue; ad close: Sept. 1. B&w page: $20,950; color page: $31,450.

Closing next week: Video, New York, vcr buyer's guide special issue, May, March 2...**Working Woman**, New York, "The year of the high-tech woman" special editorial section, May issue, March 3...**Forbes**, New York, corporate finance and New Jersey special advertising sections, April 21 issue, March 3...**Texas Monthly**, Austin, Tex., "Saving face: A man's guide to skincare and good scents," May issue, March 5...**Los Angeles**, Los Angeles, April silver anniversary issue, March 5...**USA Today**, Rosslyn, Va., real estate special bonus section, March 24 issue, March 7. ■

MediaWorks also appears in the Monday edition of Advertising Age.

TV POWER SHARES

The following chart lists network tv shows that won their time periods, ranked by audience share dominance. It is a reflection of how decidedly a particular show defeated its immediate competition and reflects the program's dominance of available audience. The numbers following the program name are the amount of share points by which the program defeated the second-place show during each week shown. An indicator of 10 or more is considered "dominant," while 5 to 10 is considered "good." Anything less than 5 is a "borderline" victory. *Source: Nielsen Overnight Ratings.*

Show	Week ending	2/20	2/13	1/6
DOMINANT WINNERS				
1. "The Cosby Show" (NBC)		31	28	28
2. "Family Ties" (NBC)		24	20	26
3. "Murder, She Wrote" (CBS)		15	11	DNA
4. "60 Minutes" (CBS)		14	16	14
5. "Dynasty" (ABC)		11	10	3
6. "Cheers" (NBC)		11	13	10
7. "Highway to Heaven" (NBC)		10	10	12
GOOD WINNERS				
8. "Hotel" (ABC)		9	6	3
9. "Miami Vice" (NBC)		7	3	5
10. "Who's the Boss?" (ABC)		7	DNA	9
11. "Night Court" (NBC)		7	-6	7
12. "ABC Sunday Movie: Mr. Mom"		7	-8	1
13. "Growing Pains" (ABC)		6	DNA	DNA
14. "Dallas" (CBS)		6	13	9
BORDERLINE WINNERS				
15. "Golden Girls" (NBC)		4	10	11
16. "CBS Tuesday Night Movie: One Terrific Guy"		2	3	6
17. "Knots Landing" (CBS)		2	1	6
18. "Kate & Allie" (CBS)		1	-1	9
19. "Newhart" (CBS)		1	-2	8
20. "CBS Movie Special: Wizard of Oz"		1	DNA	DNA
21. "ABC Monday Night Movie: Choices"		1	—7	—6
22. "NBC Monday Night at the Movies: Flashdance"		1	1	-6
23. "TV Bloopers and Practical Jokes" (NBC)		1	-1	-11
24. "Scarecrow and Mrs. King" (CBS)		1	1	DNA
25. "Disney Valentine's Special" (NBC)		1	DNA	DNA
26. "Webster" (ABC)		1	8	9

BEHIND THE SHARES

ABC climbs the chart

ABC finally has something to write home about: **"Dynasty"** is picking up steam; **"The Colbys"** is building, and **"The Monday Night Movie"** finally won an outing. There's more, but the simple fact is ABC's vital signs are definitely improving. For a while, "Dynasty" seemed to exemplify the network's ailments this season. Now the worst appears to be behind. "Colbys" also had appeared destined for early failure. But suddenly that show has taken the No. 2 position on Thursdays at 9 p.m. (ET). A year ago, critics were assailing the network's plans to clone the show, but Lew Erlicht, the bounced programing boss, kept saying, "Just give us a 25 share and we'll be satisfied." The show may hit a 24 share next week.

CBS just pulled a hat trick with its Tuesday night movie. **"One Terrific Guy"** did not get a terrific number, but its 30 share was good enough. CBS has won Tuesday for the third straight critical week. ■

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